X3.2 Update Client Person Information – Interim State Process Flow – Level 3.0

ROLES & RESPONSIBILITY MATRIX

PROCESS STEP	Workers from; Alberta Supports Contact Centre (ASCC), Alberta Supports Centres (ASC), CSA Call Centres (as appropriate), AB Works, PDD

X3.2A.1
 	
Determine which systems need to be updated (MOBIUS and/or Legacy Systems)
	Based on the "Request to change Client file/record information" from earlier steps, determine if the updates are required to Mobius and/or other systems. Loop through the sets of tasks until all requested changes have been taken care of/addressed.
	
	UPDATES TO MOBIUS
	
	   FT/PT, Apprentice, ETW/BFE, PDD – programs transitioned to using Mobius for Person record
	   • If updates are required to Mobius
	      Validation related steps before proceeding with Mobius Updates – performed by all workers
	      o Determine who is calling - client or representative?
	      o Perform following validations based on Call Centre or non-Call Centre worker and who is requesting updated to client information.
	      For ASCC worker (Call centre worker):
	        ▪ If client has phoned - proceed to **X3.3A Identity Validation** process
	        ▪ If representative has phoned – proceed to **X3.3B Identify Validation** process
	      For any In-Person situation (ASC worker / AB works worker / PDD worker):
	        ▪ If client has phoned - proceed to **X3.3C Identity Validation** process
	        ▪ If representative has phoned – proceed to **X3.3D Identify Validation** process
	
	      o If the Client or Representative has been successfully validated then
	        ▪ Proceed to step **X3.2A.3 Update Mobius as required**
	
	      o If the Client or Representative has <u>not</u> been successfully validated then
	        ▪ Inform client/representative that they cannot be properly validated and proper id/info is required for updating client information
	        ▪ Return to calling process to offer more assistance, i.e. A1-A7 Needs Identification processes (A2.26, A3.26, A4.26, A6.26)
	
	UPDATES TO OTHER SYSTEMS WITH UPDATE ACCESS
	
	   ETW/BFE and other programs where worker has access to update Person record in legacy systems (e.g. LISA, CCD, TOI, ASB, etc.)
	   • If updates are required to Other Systems where update access is granted then

X3.2 Update Client Person Information – Interim State Process Flow – Level 3.0

ROLES & RESPONSIBILITY MATRIX

PROCESS STEP	Workers from; Alberta Supports Contact Centre (ASCC), Alberta Supports Centres (ASC), CSA Call Centres (as appropriate), AB Works, PDD
	o Proceed to **X3.2A.4 Follow current processes of Validation (as required) for other program legacy systems** UPDATES TO OTHER SYSTEMS WITH NO UPDATE ACCESS *Programs where worker has no access to update Person record in legacy systems (e.g. AADL Child Intervention, etc.)* • If updates are required to Other Systems where update access is <u>not</u> been granted then o Proceed to **X3.2A.7 Follow current processes of referrals to program areas for updates**
X3.2A.3 Update MOBIUS as required	• Update MOBIUS as required • Check if Updates have been applied to all systems • If all Systems have not been updated Proceed to **X3.2A.1 Determine which systems need to be updated** • If all systems have been updated return to calling process to offer more assistance, i.e. A1-A7 Needs Identification processes (A2.26, A, 3.26, A4.26, A6.26)
X3.2.A.4 Follow current processes for Validation (as required) for other Program legacy systems	• Follow any established Validation processes for the program areas before doing the system updates • If the Client/Representative has been validated then o continue with **X3.2A.6 Update Client Person Information in legacy systems as required**, • If the Client/Representative has <u>not</u> been validated then o Inform client/representative that they cannot be properly validated and proper id/info is required for updating client information o Return to calling process to offer more assistance, i.e. A1-A7 Needs Identification processes (A2.26, A3.26, A4.26, A6.26)
X3.2A.6 Update Client Person Information in legacy systems as required	• Update Client information in the other legacy computer systems as required based on the updates requested by the client / representative • Check if Updates have been applied to all systems • If all Systems have not been updated Proceed to **X3.2A.1 Determine which systems need to be updated** • If all Systems have been updated return to calling process to offer more assistance, , i.e. A1-A7 Needs

ROLES & RESPONSIBILITY MATRIX

PROCESS STEP	Workers from; **Alberta Supports Contact Centre (ASCC), Alberta Supports Centres (ASC), CSA Call Centres (as appropriate), AB Works, PDD**
	Identification processes (A2.26, A3.26, A4.26, A6.26)
X3.2A.7 Follow current processes of referrals to program areas for updates	• Provide the client with referral information of the specific program area to have their person information updated • Check if Updates have been applied to all systems • If all Systems have not been updated Proceed to **X3.2A.1 Determine which systems need to be updated** • If all Systems have been updated return to calling process to offer more assistance, i.e. A1-A7 Needs Identification processes (A2.26, A3.26, A4.26, A6.26)